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AUTHOR Lefkowitz, Bernard; And Others
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ABSTRACT

This set of three case studies (fictional composites) is intended for use in training sessions with individuals who wish to start or improve a work/education partnership program. The case studies illustrate common experiences encountered by 21 work/education partnerships. Case #1 examines the beginnings of a work/education partnership in the city of "Riverton." Case #2 considers the often fragmented attempts at expansion and institutionalization of an effective partnership in "Fort Pierce." The final case study describes what ensued as "Johnson City's" partnership director developed the alliance from its infancy and endeavored to keep it operating over time. Each case study is followed by a list of questions for discussion. (YLB)

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# WORKING PARTNERSHIPS CASEBOOK

**The *Working Partnerships Casebook* and its companion publication the *Guide to Working Partnerships* offer important lessons for communities that are developing partnerships between public schools, businesses, government agencies, and other institutions.**

*Development of these case-studies was supported by the Edna McConnell Clark Foundation and the U.S. Department of Labor. They are written by Bernard Lefkowitz, Christopher Kingsley, and Andrew Halm. The cities described in each case are fictional composites, and the names of individuals have been changed.*

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# INTRODUCTION

The three case-studies that follow illustrate common experiences encountered by 21 work/education partnerships that were fostered over the last decade by the Edna McConnell Clark Foundation and funded primarily by the federal Job Training Partnership Act (JTPA).

Public high schools and business groups joined forces to develop curricula that would give students a clearer understanding of how their academic subjects could help them enter and advance in the labor market. The business community also coordinated each project, solicited resources, and supplied "primary labor market" jobs offering students the potential for long-term training and career development.

Program designers hoped these projects would result in enhanced self-esteem, improved school performance, and long-term employability among disadvantaged, marginally-achieving students. They envisioned that these complex alliances would be sustained as partnerships were institutionalized, and would set the stage for new collaborations to evolve. However, most communities struggled to fulfill the Foundation's vision while addressing local agendas. They faced the classic tug-of-war between adopting a successful model and instituting a good local process in which each partner could bring his/her own objectives to bear.

Projects started small to enhance manageability and increase chances for early success. Planners theorized that, armed with solid reputations, their projects could grow into system-wide programs capable of achieving institutional change.

As the projects evolved, implementation tasks inevitably took on lives of their own. Day-to-day considerations took precedence over long-term planning. Over time, projects faced the issue of "where to go from here." All of the projects faced new circumstances: turnover of key players, changing agendas of partner organizations, economic downturns and so on. They learned that their goals and management plans had to be regularly reviewed and revised.

In assessing decisions made during these partnerships' initial stages, the reader should consider not only their immediate effects, but also their potential longer-term impact.

# SETTING UP AND ORGANIZING A WORK/EDUCATION PARTNERSHIP

The case which follows examines the beginnings of a work/education partnership in the city of Riverton.

## THE BIRTH OF A WORK/EDUCATION PARTNERSHIP IN RIVERTON:

Reflecting on his four years as Superintendent of the Riverton Public Schools, Frank McCabe felt pleased. His job had been rewarding. He'd accomplished a great deal. Now, a month before he would leave for a new job in California, he would play one last card--his final gift to Riverton. He had been meeting regularly with Richard Sterling of the Chamber of Commerce to set up an alliance between the business community and the schools. They had a good program model from another city that they could adapt to Riverton, and a major foundation was offering funds to plan the replication. Both leaders agreed that the time was ripe to act.

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Across town, Richard Sterling, CEO of the Riverton Savings Bank, described his impressions of what he hoped would become the Chamber's newest community service project--replication of a work/education partnership project that had been very successful in a large eastern city. It would give the business community input into the schools' curriculum in return for jobs for students. Sterling had first heard of this partnership model through the national Chamber's newsletter, and then Frank McCabe had independently suggested that they try a similar approach in Riverton.

Sterling related: "I'm excited that a school system can improve students' performance by getting them jobs, and by strengthening academic and attendance requirements. It's great that a major city has demonstrated that positive things can happen when businesses have input into curricula. It's about time! And our schools here in Riverton certainly need that kind of help. The kids seeking jobs at my bank can barely fill out the application!

"I figure we can do the same thing here," Sterling continued. "The concept seems fairly straightforward--a good manager with strong contacts in the community ought to be able to pull it off. Riverton businesses will have to produce some interesting jobs, but there are enough of us to do it. So I'm going to ask the Chamber to take it on. When I've broached the subject with individual members, most have been willing to listen.

"If they do buy in, they'll probably have Susan Lewis, the Chamber's Executive Director, spend a lot of time on the project. She's been really good at bringing in new members over the previous year, and I expect that she could do excellent things with this project. It takes so many of the same skills, especially her subtle, persuasive approach.

"I've also spent considerable time with school superintendent Frank McCabe. Frank has always been devoted to improving the schools. Before he leaves for his new job, I expect he'll do a superb job planting 'partnership seeds.'"

Three days later, Sterling and McCabe teamed up to sell the partnership idea to the Chamber. The membership thought the idea had merit, but wanted to implement it on a smaller scale, in a few schools rather than system-wide, so that it would be less risky and require a smaller investment of jobs. Then, if it proved itself, they'd support a larger version. They also instructed Susan Lewis to oversee the project.

## SECURING RESOURCES FOR STUDENTS—THE HARD SELL:

Tom Schmidt didn't fit in, not in Riverton, not in Marshall High School where he taught distributive education, not in the business community whose help he needed to do his job. Schmidt was brash and blunt, the product of a major northeast city, relocated to Riverton, a much smaller southern city where family histories went back several hundred years and where deals were struck in private clubs over bourbon and branch water. His students and fellow teachers at Marshall High called Schmidt "the hawk." What they meant was that when he went after something he wanted, he was like a hawk sweeping down on its prey.

That spring, Schmidt was preoccupied by a stack of lumber covered by a tarp in a parking lot, and by two non-functioning stoves in a local restaurant's kitchen. He spent his lunch hours for two weeks badgering the restaurant manager into donating the lumber and stoves to his high school class. The class would use the lumber to build counters in their mock grocery store. He wanted the broken stoves so that his students could practice taking them apart and putting them back together. To get Schmidt off his back, the restaurant manager gave him what he wanted. "If you want to give a disadvantaged kid a shot at a decent life, you have to hustle your butt off," Schmidt said.

## BRINGING TOGETHER THE KEY PARTNERS

Susan Lewis felt that the hard hustle was not the Chamber of Commerce's preferred means of doing business. "We have to be careful," Susan stressed. "We need new members, and we can't afford to alienate anybody by asking too much of them when they first join. The partnership project is interesting, but it has some tough goals and I'll have to ask a great deal of people. In a few years, they may experience impressive benefits from it. But right now, I have to be cautious when I request their help. It has to be a worthwhile investment."

Ms. Lewis expected that she would have to walk a fine line in her job at the Chamber. Half of her salary was from the Chamber itself, and was designated to advance the Chamber's primary interest: promoting the economic well-being of Riverton. The rest was provided by a new JTPA grant earmarked to implement the Chamber's segment of the Partnership Program. Susan felt that her performance would ultimately be measured more by whether she increased the Chamber's membership than by whether she found jobs for poor, predominantly minority, students.

"I have to ration my time carefully," she pointed out. "I've decided to help Frank McCabe and Dick Sterling get some other important people excited about the partnership idea and then let them carry the ball. I can't afford to get bogged down by detail."

Lewis invited the executives she considered to be the city's primary "movers and shakers" to a luncheon at which they could hear a more detailed presentation about the partnership idea. She was pleased when nearly all attended. Following Richard Sterling's "kick-off" speech, she led a discussion to generate goals for the project. After considerable debate, most of those present agreed that the project should:

- help students enter and succeed in the labor market, and understand the relationship between school and work;
- provide students with "primary labor market" jobs during non-school hours;
- interject work-related information into high school English, mathematics, science, and social studies classes;
- improve students' basic skills.

Ms. Lewis then requested that those present form an Advisory Board to pull the project together. About half agreed, and confirmed that they would expect to receive a schedule for a series of planning sessions over the next few weeks.

Jim Nagy, Director of Riverton's Department of Employment and Training, left the meeting with mixed feelings. He had committed $40,000 to this partnership. The program fit the goals of the Job Training Partnership Act. But it also seemed very ambitious, and he had performance standards to meet. He wondered if jobs would be forthcoming. Would the schools be willing to make many changes? He knew that Frank McCabe could pull it off. But McCabe was leaving Riverton.

School Superintendent McCabe came out of the meeting more enthusiastic than ever. "I've worked with Dick and the Chamber on other cooperative education programs," he said. "I've had a good experience. I like the idea of helping low-income, yet average, students who usually get lost in the shuffle. Since I'm going to be leaving, I've assigned my best deputy, John Shaeffer, to attend the planning sessions. He'll be able to orient my successor, and the two of them can see that the project is implemented in several high schools."

To help infuse work-related issues into the secondary schools' curricula, Lewis recruited a Curriculum Development Task Force consisting of the dean of the local university's school of education, the director of personnel from Riverton's largest employer (a clothing mill), an official from the state Department of Education, and the public schools' Director of Special Programs. Two weeks later, this team began developing the curriculum.

With these groups up and running, Lewis scheduled the next Advisory Board meeting, had her secretary notify each Board member, and breathed a sigh of relief. Now, except for the occasional meeting to prepare for, she could refocus her efforts on her other Chamber duties.

## INTEGRATING THE PARTNERSHIP PROJECT INTO THE SCHOOLS:

Although he considered the partnership concept sound, Deputy School Superintendent John Shaeffer was not pleased about its timing. Even though Frank McCabe was behind the idea, would the new superintendent be similarly enthusiastic? Should Shaeffer put his limited time into the partnership when he was already struggling to implement a state-mandated academic advancement program throughout the entire system?

The new regulations elevated standards for student promotions, and required increased teacher course loads. The mandate corresponded well with the partnership model's call for tougher standards, but Shaeffer was reluctant to add further to teachers' responsibilities by integrating a partnership curriculum into the regular school day. He decided to schedule partnership classes after school.

His planning was also influenced by money. Riverton's low tax rates drew industry to the city and made housing affordable, but also meant that the school district's budget was tight. Incorporating work-related studies into the schools' regular curriculum would add overtime costs for many teachers. He feared that the school board would turn down a request for additional funding for these purposes.

Shaeffer's desire to minimize the cost of the program led him to make it part of the existing Distributive Education (DE) program. DE already taught some of what the Partnership Project emphasized. It would be easier to add a few lessons to the DE curriculum than it would be to persuade the general education department's English, math, science, and social studies teachers to convert to a work-oriented curriculum.

Shaeffer then requested his Director of Special Programs to tell the Curriculum Development Task Force to design a stand-alone, pre-employment curriculum, rather than change the general course of study.

Situating the project in DE and operating classes after school would make impossible the remedial instruction considered so important to the work/education partnership model. But with such little planning time, what could he do?

Shaeffer decided to spread the program among three high schools to serve a total of 75 students. On April 10th, the three principals received his memo asking them to implement the Partnership Project and to send a representative to the next meeting of the Partnership Advisory Board.

A teacher recalled her principal's response. "His first reaction was: 'What is this?' Then he reread the memo and said, 'Now they tell us!' He didn't appreciate having another project on top of his other work. He looked for a teacher who could use the extra money, and finally came up with one who was pregnant and seeking a light class load."

The last person to hear about the new Partnership Project was Tom Schmidt, "the hawk." Like the principal, Schmidt hadn't been informed about the planning, hadn't been asked to help design curriculum, and hadn't been asked to meet with business people or prospective employers. Nevertheless, he was pleased when he heard about the idea. After all, he'd spent 11 years at Marshall High preparing disadvantaged teenagers for work and finding them jobs.

"At last the community is saying that this is a problem and folks are doing something," he said. He asked the

principal if he could be Marshall High's representative on the Advisory Board. Knowing of Schmidt's expertise in Distributive Education, and that last year he had found jobs for 120 of his 150 students, the principal agreed wholeheartedly.

## THE PARTNERSHIP ADVISORY BOARD:

The Partnership Advisory Board, composed of Chamber staff members, the director of Riverton's Employment and Training Agency, three business leaders, a dean from the local university, the Deputy School Superintendent, and several teachers met at 4:00 p.m. on May 6th. Most discussion during the next two hours concerned efforts to publicize the program and to persuade employers to hire partnership students.

Tom Schmidt was pleased with the potential for this program to do some good things for the kids. As far as the public relations part went, the Advisory Board had some decent ideas. All they needed was a bit more information that would help them focus on employers who would hire kids.

Toward the end of the discussion, Schmidt stood up, and in his usually brusque fashion said, "If we're talking about jobs, let me show you where you can find them." He laid out on the conference table several long sheets displaying the names of the businesses where he had placed his students in the last year, including a family-run shoe store, a small food market, a movie theatre, a franchise clothing store, and the restaurant where he'd procured the lumber and stoves.

One executive on the Advisory Board recalled the response of the Chamber Director. "In so many words, Susan Lewis said, 'It's just fine that you found these jobs. But we're not interested in these kinds of jobs. We want <u>good</u> jobs--jobs a kid can plan his future around. We're going to find these jobs. What you have to do is get these kids ready for them."

Red-faced, Schmidt sputtered, "Damn, I thought my jobs were <u>good</u>. I mean, the kids got a chance to work, they got some money, everybody envied them. What's wrong with that?"

At the end of the meeting, as Tom was leaving with his sheets rolled up under his arm, Susan approached him. "Tom," she said, "We really appreciate your coming. But in the future I think you should leave job development to us. We need the big employers--the ones that have lots of room for advancement. We'll let you know when we need your advice."

Leah Robinson, a vice president of the Riverton Mutual Life Insurance Company, left the meeting feeling uneasy. She was concerned about the emerging strategy for developing jobs. The school and Chamber leaders expected the major businesses to provide "primary labor market" jobs for partnership students--jobs that offered students a significant amount of skills training and responsibility, and which were tied to a direct track for advancement. She knew that her company couldn't afford to provide a large number of that type of job, and suspected that the same was true for the other members of the advisory board. Maybe Tom's approach to small businesses was a good one.

She wondered whether promises of jobs made in May would actually materialize in October. Many major employers had their corporate headquarters elsewhere, and promises to provide jobs would have to be approved at those headquarters. Someone would have to follow through at the locally. Maybe the small employers <u>were</u> an important resource. Maybe Tom Schmidt was a more important resource than anybody imagined.

John Shaeffer was also uncomfortable. He had seen Schmidt's face when his offer to develop jobs was rebuffed. As a public education administrator, Shaeffer had supervised many teachers. He'd seen that expression before. It said: "Okay, wise guy, you know how to do my job better than I do. But don't expect me to bail you out when you fall on your face." True, Schmidt was irascible, annoying. But he was also a talent. Now these people were saying to him, "Be a good soldier. Follow orders." Tom Schmidt, Shaeffer decided, wasn't the kind of guy who simply followed orders.

Shaeffer could envision a scenario in which Schmidt's regular Distributive Education students got jobs, albeit "bad" jobs, while the kids in the Partnership Project waited for their "good" jobs to develop. And waited. And while they waited, the DE kids would waltz into class on Fridays and wave their paychecks in the faces of the elite, but unemployed partnership students. Somebody, Shaeffer thought, better come through with those jobs.

QUESTIONS FOR DISCUSSION: *CASE #1*

- How did the way that players were brought in to the partnership affect their attitudes toward it? What other people might have been involved?
- What motivated involvement? What will need to happen to maintain the involvement of each player?
- What decisions were made by each key player that affected the partnership project's chances for success?
- How did the partnership's organizational structure, or lack of it, affect this project?
- If you could start all over again, how might you reorganize the project to avoid some of the problems it is now facing?
- How were perceptions of "ownership" of the program, or lack of it, reflected in each person's actions and attitudes toward the project?
- How did Susan Lewis' perception of her various professional responsibilities affect the cohesiveness of the planning process? What did she perceive the project to be? What message did it deliver to others who were involved in planning and implementation? What did Lewis handle well?
- If you were Richard Sterling, Frank McCabe, or John Shaeffer, would you have handled the project differently during its initial stages? What did each of these individuals perceive the Partnership Project to be? How would their perceptions affect the development of the project?
- What is your opinion in the debate about "good jobs" versus those Tom Schmidt had been developing? Could Schmidt have been utilized more productively?
- What "repairs" could be made now to increase the effectiveness of the program, and the commitment and ownership of the project among each player?

## EXPANDING AN EFFECTIVE WORK/EDUCATION PARTNERSHIP: WHAT ROAD TO PURSUE?

The case that follows considers the often fragmented attempts at expansion and institutionalization of an effective partnership. After five years of operation, the project found confronted decisions that could change not only its short-term goals, but also policies and practices that had been in place for many generations.

### THE ENVIRONMENT FOR A PARTNERSHIP IN FORT PIERCE:

Fort Pierce is a West Coast city of 300,000 people. Although it has begun attracting new high-tech and service industries, a decline in shipping, its primary industry, has created an economic downturn over the last five years. Young people, especially minority teenagers and those with inadequate basic skills, find opportunities for employment severely limited.

The city's government and business leadership recognized that many of its youth needed special help to achieve long-term employability. For years, local employers had complained that high school graduates lacked adequate basic skills and understanding of work-place behaviors. An analysis of what young people were doing a year after graduation made it clear that those who had attended school regularly yet just managed to get by were inadequately prepared for the labor market.

In the mid-1970s, a new mayor made youth unemployment a major priority. Stimulated by the Chamber of Commerce, many of the city's top leaders joined forces to create a high-powered council responsible for improving the quality of the youthful work-force. Given this strong, active backing, the Fort Pierce Partnership Project came about, distinguished by careful, coordinated planning. Roosevelt High School was selected as a promising site on which to build a program.

### ROOSEVELT HIGH SCHOOL: THE PILOT SITE:

Roosevelt stands in the middle of the socio-economic and academic spectra. Nearly 65 percent of its students graduate and about half that number go to college. The changing demographics of its student population are evident in the sports photographs decorating its corridors. Until the 1970s, the teams were all white. In the last fifteen years, the pictures depict increasing numbers of Blacks and Asians.

For years Roosevelt had offered a traditional curriculum, plus advanced placement courses for college-bound students. But Roosevelt was also the partnership's logical pilot site because its principal recognized that unless they were offered something more, "average" students might "fall through the cracks." So he supported a unique third track for marginally achieving juniors and seniors. It provided employment-related courses, support services such as child care, and limited supplementary polishing of basic skills.

Thirty disadvantaged students who maintain a C grade-average and good attendance can enroll in the Partnership Project. They are mainstreamed in regular science, history, geography, and physical education courses, but attend "Partnership English" and "Partnership Math" classes that focus somewhat more on basic skills than do traditional curricula. "Life Skills" and employment-related classes are also offered.

Summer and part-time after-school jobs are provided to partnership students who maintain satisfactory academic performance. These are usually "primary labor market" jobs relating to students' school work and interests, and leading to advancement or full-time employment upon graduation.

## THE PARTNERSHIP PROJECT DIRECTOR:

Evelyn Shelby is Executive Director of the Partnership Project. She had previously worked in the human resources department of a local corporation, and had taught for five years in the Fort Pierce school system. Shelby has fostered a good rapport with local personnel departments, and enjoys warm relationships with Roosevelt High's principal and teachers. She is seen as an "insider" in both worlds, rather than as someone encroaching on the turf of either partner.

Her success is reflected in "positive terminations" from the program. After its first two years, 90% of the Partnership students were employed or pursuing postsecondary education.

"We are trying to make Roosevelt High School's program for juniors and seniors a model for the entire school system," Shelby explained. "Small though it might be, if what we are doing here succeeds, the partnership effort can become a 'linchpin' for a comprehensive, system-wide program to prepare average "forgotten" students for a vocation. We can give a different focus to these kids' education. The schools can build on it by expanding work-oriented classes to serve freshmen and sophomores.

Seniors can receive increased career development activities. In the past, it was a question of either getting lost or going to college. Now we can offer kids a third path--education with a real payoff."

## DECISION POINTS: SHOULD THE PROGRAM BROADEN ITS FOCUS?

After seeing what Roosevelt's project achieved with 30 students in each of its first two years, Assistant School Superintendent John Malone suggested doubling the size of the program. "I had some discretionary money, and was impressed with what Evelyn and her program had achieved," Malone recalled. "I felt good about investing in her. But if her project was going to effect system-wide change, the other schools, the politicians, and the public would need to know how good it was. She would need more publicity, but wouldn't get it unless she served more than 30 kids annually."

Shelby resisted. She told Malone, "I don't want to risk such an expansion. We've achieved great results with small numbers of students. With 60 students a year, I doubt we can get the same quality of jobs or the same outstanding teachers. My view is stay small, but stay good. You can measure success in terms other than numbers."

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At the same time, success with "average" students led officials of the Fort Pierce Department of Employment & Training to suggest that the partnership expand to include harder-to-serve youth. This recommendation carried considerable weight, because the Department provided most of the partnership's funding with monies from the Job Training Partnership Act (JTPA). At the national level, critics of JTPA were claiming that the system was "creaming" participants by enrolling youth who were easy to serve in order to get good results.

Shelby pointed out that the current partnership students were not easy to serve. "Our kids are disadvantaged, most are minorities, and all are unemployed. They aren't the worst kids," Shelby said. "But they aren't the best either. Fort Pierce has four programs for school dropouts, and JTPA supports those too," she continued. "But only we have bothered with these kids who have plenty of problems yet still have the perseverance to stay in school. Without our help, they'll graduate with neither the basic skills nor the work experience to make their graduation mean anything."

Shelby also suspected that the at-risk youth would be a much greater challenge to serve than the C-average students were. Their attendance records showed frequent absenteeism and truancy. Almost all came from broken homes and extreme poverty. Some could barely speak English.

"It will be hard," she stressed, "to find jobs for the really at-risk kids, hard to keep them in the jobs. The social problems, family problems, learning problems, lack of job openings, perception among employers that they are 'bad' kids--it will take a tremendous effort and will blur the focus of the program. The failure rate will seem much higher. When the schools and the employers look at the combined rate of 'positive terminations,' they won't distinguish between groups. It will become a lot harder to sell the program.

"I feel strongly that it would be better to keep doing what we've been doing. We need to build on our success with the regular partnership kids," Shelby continued, "rather than go off on a tangent. Our first consideration should be to have some impact over time with the current partnership model."

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A third pressure for change arose during the partnership's fourth year when testing was conducted throughout the school system to examine the basic skills of high school students in Fort Pierce. The results confirmed that many low-income youth lacked reading, writing, and math skills to advance in the labor market. Unexpectedly, the data indicated that the special Partnership English and Partnership Math classes had brought about little improvement in participants' basic skills.

The researchers concurred that if disadvantaged young people were to become employable over the long-term, they would need much more help in improving their basic skills. These results presented the Partnership Project with a need to introduce a more formidable basic skills remediation effort.

## FORMULATING A VISION: WHAT SHOULD THE PROGRAM BECOME?

These three issues of program expansion--increasing the number of youths served, adding at-risk youths, and incorporating intensive basic skills remediation--were the focus of the Partnership Project's fifth annual meeting.

Shelby sat quietly early in the meeting to get a feel for consensus among the leaders. For an hour, debate was heated.

Superintendent of Schools Arthur Linden was upset. "We started this project with the idea that it would prove itself on a small scale before we began any expansion. That way, major new expenditures by the schools would be for techniques that we knew to be successful. I still stand by that concept. John Malone and I have discussed a small expansion of the number of kids served. That wouldn't cause much disruption. I might even be willing to back expansion of the existing program to other schools in a year or two.

"On the other hand," he continued, "serving at-risk students or expanding basic skills remediation are new, unproven, and expensive concepts. They're not part of the original partnership agreement, and I'm not prepared to support them."

Jack Gilbert, the school department's Director of Vocational Education, was adamant. "None of these expansion ideas are among the things we started out to do. Is it worth jeopardizing a partnership that is succeeding on its own terms? With the program as it is now, almost all the partnership kids are still in school," he asserted. "Many would have dropped out if it weren't for this program."

Mary Stark, Director of Personnel for the city's largest bank supported him. "The students at my bank perform well at work and satisfy the school's requirements. Several expressed interest in college. We plan to offer several others excellent full-time employment after they graduate. They'll have plenty of opportunity to advance. But we can't offer more jobs than we already are, and we can't offer additional supervisory time to new kids that are harder to work with."

Jean Harwell, Executive Director of the Private Industry Council, spoke next. "As a member of two worlds--business and JTPA--I'd like to balance this discussion. There is little doubt that the partnership has helped business to some extent. We've seen the effects we originally hoped for. The partnership kids, small though their numbers might be, turn out to be good workers for the most part. Roosevelt High now has a work-oriented curriculum that we helped to design. The schools came through. They let business in."

Pausing momentarily, Harwell looked around the room, then continued: "But now I have to put on my JTPA hat. First, for very good reasons, the Department of Labor has put

new emphasis on basic skills remediation. Regardless of whether a disadvantaged kid is in or out of school, the Department clearly expects to see the development of basic skills remediation components in the programs it funds. And it's DOL that is funding 80% of this partnership. Second, we set out originally to help kids. Remember the kids? Well, they need to improve their basic skills, and JTPA is offering us the funds to give them that service. The schools won't have to foot the entire bill. And third, testing shows that we should question whether we're adequately doing what we set out to do."

John Malone felt torn. "Right now, we can serve more of the kind of kid we've been working with <u>if</u> we limit services to what we already provide. But if we serve at-risk kids, we'll have to add a bunch of services including a <u>very</u> formidable basic skills remediation component." Malone continued, "Even a major push to improve our current partnership students' basic skills over and above what we're already doing will take a huge commitment from the schools--new curricula, more instruction time, more teachers. I don't know how much JTPA can cover, but if you want it, you must be prepared to pay."

The debate disturbed Shelby. The timing was wrong--maybe in three years when the Partnership Project's value was completely recognized, but not now. The message being delivered to the schools seemed to be that their efforts had been for nothing. She worried that this was a perfect ingredient for defensive resistance. It was time to speak.

"The Partnership Project has always addressed the need for average achievers to improve their basic skills. It was never intended to work with dropouts or kids who are more at-risk than those we're already serving. It was certainly not intended to put the weight on the schools that you're talking about now. They have a tough enough time doing what they're already doing, especially on their limited budget.

"Consider your own professional advancement," she went on. "Do you remember how <u>you</u> moved forward in the labor market? You found out through your jobs that you needed a new skill here or there to earn the raise or new position you wanted."

Shelby paused, noting heads nodding in agreement. Many of those present concurred that success on the job was a great motivator for students. Then she continued, "Partnership students are demonstrating that they are competent enough to hold a job. They didn't used to be.

And if we expand too much, there won't be enough jobs to assure students those valuable experiences.

"We have always hoped that as opportunities for vocational development open up, our students would be motivated, like you, to further their educations. The program is too young for us to know yet whether they do, but we believe that they will see learning as the way to build their futures. We think that it should be a decision <u>they</u> make."

"I recommend that the Council vote against expansion so that we can continue to be effective with the students we are best qualified to work with. Let our long-term successes on a small scale at Roosevelt High be the carrot that will draw other schools to us. Let them replicate the program, and by that route bring about institutionalization of the partnership concept!"

As Shelby sat down, she hoped that she had swayed the committee. It was in their hands now.

**QUESTIONS FOR DISCUSSION:** *CASE #2*

- What is needed to judge the success of the program? to evaluate the results?

- Why were a variety of "expansion proposals" being pushed on the program? What might have been a better way to manage expansion?

- How large does a project need to be to bring about institutional change? How do you evaluate the single-school model of institutional change? What obstacles is the program likely to face in attempting to institutionalize the Roosevelt model throughout the system?

- Assess the positive and negative effects of Shelby's decision to restrict the number of participants.

- What might be the institutional impact of excluding "at-risk" youngsters from the program? Could they be included without endangering the institutional support for the program or the focus of the program? How might their inclusion affect the Partnership Project's agenda for institutional change?

- What might be the impact of foregoing a remedial component? Do you agree that work experience will stimulate young people to seek out education on their own? What alternative strategies could be implemented to introduce a remedial component while preserving the program's agenda? How could including a remedial program enhance the partnership's institutional impact?

- Given the diversity of opinions about what the partnership should become, what do you think the committee should decide?

- Shelby mentioned the element of "timing" several times. Even after five years of "success", she felt that the program needed more credibility before it pushed anybody. Do you agree with her?

- Shelby wielded considerable influence over program design and direction. Would you change the power structure of the program?

## PLANNING, IMPLEMENTING, & SUSTAINING A WORK/EDUCATION PARTNERSHIP

This case study describes what ensued as Johnson City's partnership director developed the alliance from its infancy, and endeavored to keep it operating over time.

### THE JOHNSON CITY PARTNERSHIP PLAN:

Recognizing that too many young people were dropping out of Johnson City's high schools, the mayor, school superintendent, and Chamber of Commerce president joined forces in January 1984 to launch a partnership that they hoped would encourage marginal students to stay in school.

The partnership was based on the belief that if youth understood the relationship between what they learned in school and what was required to succeed in the world of work, they would be more inclined to continue their secondary education through to graduation. The three leaders signed a pact in which it was agreed that:

- The public schools would allow employers to assist in redesigning the curriculum to emphasize the relationship between pre-employment skills and the ability to work;

- The business community would provide students with "primary labor market" jobs related to the students' studies, and offering potential for long-term training and career development;

- The city government would finance the bulk of partnership activities through its Employment & Training Administration with funds from the Job Training Partnership Act (JTPA);

- A permanent Partnership Leaders Committee, composed of the three signers plus other interested leaders, would oversee the project.

The signers hoped that the partnership would reduce the dropout rate by providing disadvantaged students who were not high academic achievers the tangible benefits of after-school jobs, enhanced self-esteem, better preparation for the work world, and full-time employment upon graduation.

Charles Hobson was hired as full-time executive director to translate the agreement into a formal action plan, and to coordinate the resulting activities.

## THE FIRST EIGHT MONTHS OF PLANNING:

Three months after the signing of the agreement, Hobson felt entitled to a small smile of satisfaction. As a result of his hard work, the Johnson City Partnership Project had begun to gel and had captured the interest of this traditional, conservative city. It hadn't been easy, but come the fall, this bird ought to be ready to fly.

Since he'd come on board, Hobson had coordinated a complex planning process. He'd put 7,000 miles on his 1978 Honda, primarily traveling from his office at the Chamber of Commerce to countless meetings. He'd established the two working committees needed to tackle crucial start-up tasks.

With the school superintendent's help, Hobson had secured the cooperation of two principals in return for the promise of good jobs for their students. He knew that he had to have them on-board because in Johnson City the schools' power structure was decentralized. Without the principals, he'd never have been able to get the partnership operating during school hours no matter how supportive the superintendent was.

Hobson had also initiated the development of an excellent pre-employment curriculum that would be taught in the schools by the very people who developed it. The Curriculum Development Committee teachers were soliciting employer input, and a local university was providing information about new curricula and teaching methods.

Recently he had worked with a community-minded personnel officer to secure the support of her software firm, one of the largest and most respected local corporations. She had agreed to chair his Job Development Committee and negotiated an agreement with the local electric utility trading jobs for newspaper articles describing the good things they were doing for the community. And she had promises from eight major companies to provide ten jobs each in the first year of the partnership in return for input into the schools' curriculum.

## THE CONTRAST AT START-UP:

Eight months after the signing of the agreement, as Hobson looked at the faces of the 20 students in the first partnership class, he felt his spirits sink. The kids were full of anticipation, but last night's Partnership Leaders' Committee meeting did not bode well for them.

An economic downturn had brought hard times to the city. Several local industries had lost contracts. Their difficulties were adversely affecting their local. Many business leaders were now compelled to back down on earlier

commitments to provide jobs for partnership students. How could they justify hiring kids while laying off adults? CGK Software, Inc. was offering three jobs instead of ten. First Reserve Bank was, reluctantly, offering two jobs. Copeland Magnetics, with the largest work-force in the city, was offering nothing. They all had the same story.

During that meeting, Constance Warden, the city's JTPA administrator had been particularly upset. Her agency was under political pressure to deliver jobs for adults who'd been laid off, in many cases by the companies serving on the council. Warden reminded the leaders that JTPA had been reluctant to join the partnership project. It didn't fit her agency's priorities. She'd been pushed hard to fund the partnership by the mayor and some of the same leaders who were now reneging on commitments.

"We'll have to re-evaluate this program," she'd said. "Most of our youth-money is earmarked for school dropouts. I backed this in-school program only because it promised to provide unsubsidized jobs. I still have some discretionary funds, but you'll have to make a strong case for me to give it to the partnership."

Hobson wondered whether he was the only one who remembered that the issue here was supposed to be kids. This was supposed to be a partnership. The partners were supposed to provide jobs, but nobody ever thought the economy would nosedive so quickly! Should he hold the employers to their commitments? He could get the school superintendent to pressure the businesses. He could get newspaper coverage to embarrass them for breaking their promises. But this economic downturn wasn't business' fault. Should he seek additional JTPA money, perhaps to create subsidized jobs for kids? Maybe he should hire a job developer and turn the partnership into a more traditional manpower program. He could also accept secondary labor market jobs like burger-pushing or housekeeping.

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Two hours later, Hobson met with Bill Martin, a new vice president of Copeland Magnetics, who had been lured from a consulting firm to help Copeland develop strategies to offset the economic downturn. The conversation reminded Hobson how much he missed Martin's predecessor, Leslie Blachman. Martin was firm. "Look, I'm sorry Leslie promised you things we can't deliver. I know the partnership was Leslie's pet project. But she isn't with the company any more, and there's no way anyone could have foreseen these problems."

Despite further discussion, Martin remained adamant; until the economy improved, Copeland could not offer primary-

labor-market jobs to students. Adults would want those jobs, and he felt Copeland's community responsibility was to insure that breadwinners were employed. But he was prepared to contribute $5,000. Hobson was not thrilled, but the cash might subsidize a few positions. Still, Hobson wasn't sure he wanted to go the subsidized job route. In the past, subsidized jobs rarely lasted beyond the period of subsidization. After a few months, the kids weren't much better off than before the program started.

Accepting the money would bring another hitch. Under Leslie Blachman's leadership, Copeland had been one of the partnership's most enthusiastic advocates. She had worked hard to sell the idea to other companies. If Copeland pulled out, it would give a signal to other less-committed employers, a rationale for substituting cash for jobs.

If Hobson took the money it would confirm his departure from one of the program's guiding philosophies: He'd been stressing for months that the role of companies in this program was to provide good jobs for kids. He wasn't looking for their money.

Then Martin put an idea on the table. "Why don't you do it this way? Lots of companies here, worried about the economy, don't want to take a chance on some unproven kid while struggling to keep their books in the black. You could use our money to subsidize kids' wages for the first three months at no risk to the company. Then, if the kids work out, they're put on the regular payroll. You make sure companies agree up-front on paper--no hand shakes."

The art of compromise, Hobson thought bitterly. But what could he do? This was the price he had to pay to get the program running." Make the check out to the Partnership Program," Hobson said, trying to disguise his frustration.

## AT THE END OF THE FIRST YEAR:

Despite the roadblocks, Johnson City's partnership had placed 80% of its participants into part-time and summer jobs by the end of its first year. Although many received secondary-labor-market jobs that Hobson and the program's new job developer had arranged with non-partnership employers, it was still good news. At least no deserving student had been "burned" because of reneged commitments. The rest of the news wasn't so good.

## PLANNING FOR THE SECOND YEAR:

Wilson High's new principal, Dr. Alan Fitzgerald, was under pressure. When budget cuts closed his old school, he and half its students had moved to Wilson. The ramifications of the merger were felt in the partnership program.

In the fall, Wilson High would be filled to capacity. Even though Hobson had told Fitzgerald all the good things about the partnership, the new principal said he couldn't let a small project interfere with the more important issues he <u>had</u> to deal with. Fitzgerald felt he would need the partnership's classrooms for regular classes.

When Hobson suggested scheduling partnership classes after school, parents complained. They didn't want their kids coming home after dark. So he considered a compromise--maybe he could get the school opened on Saturdays for the partnership kids. Of course, he could probably move the classes to the university just down the street from the school. Then, maybe, the kids could attend partnership classes during their free periods or study halls.

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In July, as Hobson lined up jobs for the second year, another new set of demands emerged. Prospective employers indicated that the partnership's pre-employment classes were not enough. Remedial instruction in English and math was needed.

One executive explained, "With the economic downturn, we have fewer jobs to offer. Competition for them is more intense. We've automated and reduced the number of low skill jobs we have available. We need more qualified workers." A supervisor added, "The kids can't learn how to type, use a word processor, or run an automated mailing system. They can't get anywhere in our company unless they learn to read better." Employers asked the partnership to teach more than its curriculum was ever intended to.

Hobson found irony in their request. Last year, some of these same employers had worked with the schools to develop a work-oriented course of study. Teachers had visited work sites, and job supervisors had participated in the classes. <u>All</u> had agreed that what the students needed were work-oriented classes stressing personal appearance, job interview prepping, and work requirements such as punctuality, meeting deadlines, and following instructions.

To focus on basic education would require a long-term, intensive intervention. Such a system might transform the partnership into an alternative school within the regular school, which Hobson expected might be too drastic for many to accept. Yet it was a shift that Hobson thought he might have to make. "With endurance and commitment maybe we can bring the school system and teachers around," he said. "But if we go up against the employers, and we don't have many to choose from, we won't have jobs. And in this program if you don't have jobs the kids get burned. Then you don't have anything."

## QUESTIONS FOR DISCUSSION: *CASE #3*

As Hobson prepared for the next meeting of the Partnership Leaders' Committee--the important one that would structure the program's goals for its second year--he pondered many questions:

- What should be his primary agenda items at the meeting?
- Should he suggest that the partnership's goals be redefined? If so, in what ways?
- What types of jobs should he recommend that the partnership seek? What means should be used to solicit those jobs?
- What options should he consider for where and when his classes should be held?
- What should he recommend regarding basic skills remediation? Are there other ways that youngsters might be helped to improve their reading, writing, and math?
- Where might JTPA funds fit in?
- How could the partnership address the issue of broken commitments?
- How might the difficulties caused by turnover of key players have been avoided or at least minimized?
- How can the partnership prepare for future, unexpected contingencies?
- What other recommendations could he make that might prevent or minimize the problems he had faced over the past year?